

# University Advancement

SHSU Strategy in Action

FY 2027 Planning and Budget Presentation

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MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

# University Advancement

## Division Departments

- Advancement Services
- Alumni Relations & Annual Giving
- Development
- Donor Relations
- Sam Houston Memorial Museum and Republic of Texas Presidential Library

# Part 1 – Execution Accountability

# University Advancement FY25 Funded Initiative Outcomes

Initiative	Original Allocation Overview	Implementation Status	Measurable Outcomes / Early Indicators	Next Steps	Strategic Alignment
<b>1: Leadership Annual Giving Officer (LAG Officer)</b>	<ul style="list-style-type: none"> <li>Institutional Funds were used to hire 2 LAG officers.</li> </ul>	<ul style="list-style-type: none"> <li><b>Fully Staffed and operational (Fall 2025)</b></li> </ul>	<ul style="list-style-type: none"> <li>150% ROI achieved per officer</li> <li>Each officer generating \$100K+ in gifts</li> <li>Rapid progression toward 2.5x return</li> </ul>	<ul style="list-style-type: none"> <li>Scale leadership giving pipeline through data-driven targeting</li> <li>Increase donor retention and major gift conversion</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth and Donor Development)</li> </ul>
<b>2: Museum Market Adjustments</b>	<ul style="list-style-type: none"> <li>Increased O&amp;M for historical interpreters</li> <li>Expanded support for tours and visitor engagement</li> </ul>	<ul style="list-style-type: none"> <li><b>Implemented and operational (Fall 2025)</b></li> </ul>	<ul style="list-style-type: none"> <li>Increased visitor engagement and tour volume</li> <li>Expanded statewide visibility and institutional partnerships</li> <li>Improved staffing stability and program continuity</li> </ul>	<ul style="list-style-type: none"> <li>Expand staffing and program capacity ahead of Texas Bicentennial</li> <li>Increase statewide visibility and community engagement</li> </ul>	<ul style="list-style-type: none"> <li>Brand and Community Engagement</li> <li>Enrollment and Visibility</li> </ul>
<b>3: Software renewal and Credit Card Processing</b>	<ul style="list-style-type: none"> <li>Increased O&amp;M for Blackbaud CRM and payment processing</li> <li>Expanded system capacity for donor data management</li> </ul>	<ul style="list-style-type: none"> <li><b>System upgrades completed and in use (Fall 2025)</b></li> </ul>	<ul style="list-style-type: none"> <li>Expanded CRM capacity from 200K 300K donor records</li> <li>Improved donor segmentation and data management capabilities</li> <li>Enabled scalable fundraising operations and outreach</li> <li>~\$14,000 collected in Credit Card fees</li> </ul>	<ul style="list-style-type: none"> <li>Leverage expanded CRM capacity to increase donor outreach and targeting</li> <li>Optimize digital giving and payment processing efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Operational Efficiency and Advancement Infrastructure)</li> </ul>
<b>4: Increased VP-UA Office Travel</b>	<ul style="list-style-type: none"> <li>Expanded travel to support donor cultivation and partnership development</li> </ul>	<ul style="list-style-type: none"> <li><b>Implemented and supporting donor engagement (Fall 2025)</b></li> </ul>	<ul style="list-style-type: none"> <li>\$26M+ raised by Advancement teams</li> <li>Increased alumni engagement (+1% over two years)</li> <li>Expanded donor cultivation and partnership pipeline</li> </ul>	<ul style="list-style-type: none"> <li>Expand donor engagement through targeted travel and strategic partnerships</li> <li>Increase major gift pipeline development</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth and Strategic Partnerships)</li> </ul>



# FY25 Keep–Stop–Start (KSS) Initiative Progress

## University Advancement

Initiative Area	Key Accomplishments	Status	Evidence of Impact	Strategic Plan Alignment
<b>KEEP #1 – Alumni Events &amp; Chamber Memberships</b>	<ul style="list-style-type: none"> <li>Delivered high-profile alumni events (Gala, Ring Ceremony, 79 Awards)</li> <li>Strengthened regional relationships through chamber partnerships</li> </ul>	<ul style="list-style-type: none"> <li><b>Ongoing</b></li> </ul>	<ul style="list-style-type: none"> <li>Increased alumni engagement and visibility in key regional markets</li> <li>Strengthened partnerships with local business and community leaders</li> <li>Supports long-term donor pipeline and institutional reputation</li> </ul>	<ul style="list-style-type: none"> <li>Community Engagement</li> <li>Academic Excellence</li> </ul>
<b>KEEP #2 – Museum Programming</b>	<ul style="list-style-type: none"> <li>Expanded museum programming and campus integration efforts</li> </ul>	<ul style="list-style-type: none"> <li><b>Ongoing</b></li> </ul>	<ul style="list-style-type: none"> <li>Increased visitor engagement and participation in museum programs</li> <li>Expanded role of museum in recruitment and campus experience</li> <li>Strengthened partnerships across campus and with community programs</li> </ul>	<ul style="list-style-type: none"> <li>Community Engagement</li> <li>Elevate the Reputation and Visibility of SHSU</li> </ul>
<b>STOP #1 – Alumni Membership Model</b>	<ul style="list-style-type: none"> <li>Eliminated annual membership dues model</li> <li>Transitioned to engagement-focused alumni networking strategy</li> </ul>	<ul style="list-style-type: none"> <li><b>Completed</b></li> </ul>	<ul style="list-style-type: none"> <li>Expanded access and participation in alumni engagement opportunities</li> <li>Shifted focus to career connections and relationship-building</li> <li>Positioned Alumni Relations to increase long-term engagement and giving</li> </ul>	<ul style="list-style-type: none"> <li>Community Engagement</li> <li>Elevate the Reputation and Visibility of SHSU</li> </ul>
<b>STOP #2 – Hosting alumni events with limited or no ROI. Eliminate simple attendance as a KPI. Move to relationship building and stewardship as KPIs</b>	<ul style="list-style-type: none"> <li>Eliminated events in NYC, Houston Race Park, Bearkats in Business. Minimized event cost for annual holiday celebration.</li> <li>Reimagined a successful "Face to Face" scholarship luncheon.</li> </ul>	<ul style="list-style-type: none"> <li><b>Completed</b></li> </ul>	<ul style="list-style-type: none"> <li>Events with limited/no ROI have been cut from programming efforts.</li> <li>New focus on stewardship from Alumni Relations and Donor Relations is effective.</li> </ul>	<ul style="list-style-type: none"> <li>Community Engagement</li> <li>Elevate the Reputation and Visibility of SHSU</li> </ul>

# FY25 Keep–Stop–Start (KSS) Initiative Progress

## *University Advancement*

Initiative Area	Key Accomplishments	Status	Evidence of Impact	Strategic Plan Alignment
<b>STOP #3 – Mass mailings and implement new technologies, including AI, to strategically communicate with constituents.</b>	<ul style="list-style-type: none"> <li>Eliminated mass mail solicitations and paper receipts</li> <li>Implemented e-receipts and digital communication tools (EverTrue)</li> <li>Transitioned to data-driven donor communication strategy</li> </ul>	<ul style="list-style-type: none"> <li><b>Completed</b></li> </ul>	<ul style="list-style-type: none"> <li>Reduced administrative and printing costs through digital transition</li> <li>improved efficiency and scalability of donor communications</li> <li>Enabled more targeted and strategic engagement with alumni and donors</li> </ul>	<ul style="list-style-type: none"> <li>Elevate the Reputation and Visibility of SHSU, Agility (Operational Efficiency, Donor Engagement, Brand and Visibility)</li> </ul>
<b>START #1 - Leadership Annual Giving (LAG Program)</b>	<ul style="list-style-type: none"> <li>Launched Leadership Annual Giving (LAG) program to bridge annual and major gifts</li> <li>Hired 2 LAG officers focused on recurring and mid-level donor development</li> </ul>	<ul style="list-style-type: none"> <li><b>Completed</b></li> </ul>	<ul style="list-style-type: none"> <li>Achieving 150% ROI per officer</li> <li>Each officer generating \$100K+ in gifts</li> <li>Strengthening pipeline between annual giving and major gifts</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth, Donor Development)</li> <li>Community Engagement</li> </ul>

# University Advancement FY 26 Funded Initiative Outcomes

Initiative	Original Allocation Overview	Implementation Status	Measurable Outcomes / Early Indicators	Next Steps	Strategic Alignment
<p><b>Director of Advancement Communications</b></p>	<ul style="list-style-type: none"> <li>Funded Director of Advancement Communications role</li> <li>Established centralized, donor-focused communications strategy</li> </ul>	<ul style="list-style-type: none"> <li><b>In progress and actively building communications infrastructure</b></li> </ul>	<ul style="list-style-type: none"> <li>Established centralized advancement communications function</li> <li>Standardized donor messaging across campaigns and proposals</li> <li>Improved coordination of digital engagement (email, social, storytelling)</li> <li>Early indicators of increased engagement across communication channels</li> </ul>	<ul style="list-style-type: none"> <li>Increase donor response rates through targeted campaigns</li> <li>Expand multi-channel engagement strategy</li> <li>Improve proposal effectiveness and close rates</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth, Donor Engagement, Brand and Visibility)</li> </ul>





# FY26 Keep–Stop–Start (KSS) Initiative Progress

## University Advancement

Initiative Area	Key Accomplishments	Status	Evidence of Impact	Strategic Plan Alignment
<b>KEEP #1 – Leadership Annual Giving Officers</b>	<ul style="list-style-type: none"> <li>Increased new donor engagement and first-time giving</li> <li>Generated new major gift prospects and closed select major gifts</li> <li>Strengthened donor stewardship and pipeline development</li> </ul>	<ul style="list-style-type: none"> <li><b>Implemented and Ongoing</b></li> </ul>	<ul style="list-style-type: none"> <li>Each officer generating \$100K+ in gifts</li> <li>Achieving ~150% ROI per officer</li> <li>Strengthening pipeline between annual and major gifts</li> <li>Evidence of growing philanthropy culture</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth and Donor Development)</li> <li>Institutional Reputation</li> </ul>
<b>KEEP #2 – Grow Advancement Team</b>	<ul style="list-style-type: none"> <li>Expanded Advancement staffing to support growing donor engagement demand</li> <li>Added key roles to increase capacity in annual giving and operations</li> <li>Identified need for Director of Planned Giving and Grant Writer</li> </ul>	<ul style="list-style-type: none"> <li><b>Ongoing</b></li> </ul>	<ul style="list-style-type: none"> <li>Added 4 FTEs since FY22 to support advancement growth</li> <li>Filled three key annual giving and administrative roles</li> <li>Increased organizational capacity to support donor engagement and fundraising efforts</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth, Organizational Capacity, and Culture of Philanthropy)</li> </ul>
<b>KEEP #3 – Giving Day Platform</b>	<ul style="list-style-type: none"> <li>Continued annual Giving Day using ScaleFunder platform (Year 3)</li> <li>Secured \$125K+ in matches and challenge gifts</li> <li>Expanded donor participation and engagement strategy</li> </ul>	<ul style="list-style-type: none"> <li><b>Ongoing</b></li> </ul>	<ul style="list-style-type: none"> <li>Increased from 740 gifts / \$100K+ (FY24) to 1,049 gifts / \$308K+ (FY25)</li> <li>Significant growth in donor participation and total funds raised</li> <li>Expanding pipeline of annual and first-time donors</li> </ul>	<ul style="list-style-type: none"> <li>Agility (Revenue Growth, Donor Engagement)</li> <li>Student Success</li> </ul>



# FY26 Keep–Stop–Start (KSS) Initiative Progress

## University Advancement

### Initiative Area

### Key Accomplishments

### Status

### Evidence of Impact

### Strategic Plan Alignment

#### STOP #1 – Over-reliance on Same Donors

- Shifted prospecting strategy to prioritize new and reactivated donors
- Leveraging giving history and wealth analytics to identify emerging prospects
- Reallocated outreach to reduce concentration risk and donor fatigue

▪ **In progress**

- Increased focus on new and reactivated donor segments
- Improved tracking of donor concentration and acquisition metrics
- Early progress toward diversifying donor base and reducing reliance on top donors

- Agility (Revenue Sustainability, Institutional Effectiveness, and Donor Engagement)

#### START #1 – Advancement Communications

- Launched centralized Advancement Communications strategy
- Standardized donor messaging and coordinated digital campaigns
- Enhanced storytelling and marketing to support donor engagement

▪ **In progress**

- New communications leadership position approved and posted
- Establishing a foundation for improved donor engagement and outreach
- Positioned to increase response rates and proposal close rates

- Agility (Revenue Growth, Donor Engagement, and Culture of Philanthropy)

#### START #2 – Expand Foundation & Grant Funding Pipeline

- Strengthened partnership between Corporate & Foundation Relations and ORSP
- Coordinated outreach and referral process to expand funding pipeline
- Increased faculty engagement in foundation and grant opportunities

▪ **In progress**

- Active foundation and grant funding pipeline established
- Increased coordination, driving a higher volume of funding opportunities
- Positioned to increase proposal submissions and external funding awards

- Agility (Revenue Growth)
- Academic Excellence
- Research and External Funding

# **Part 2 – Strategic Resource Alignment (*Budget Requests*)**

# FY27 Operational Enhancements

## University Advancement

Priority	Proposal	What the Investment Enables	Why Needed Now	Expected Outcomes / Institutional Impact	Strategic Alignment
1	Salesforce Software	<ul style="list-style-type: none"> <li>▪ Implements unified CRM platform across Advancement and the university</li> <li>▪ Integrates donor, alumni, and student engagement data</li> <li>▪ Enhances data-driven outreach and relationship management</li> </ul>	<ul style="list-style-type: none"> <li>▪ Current systems are fragmented, limiting data visibility and coordination</li> <li>▪ Immediate need for integrated CRM to support engagement and fundraising growth</li> </ul>	<ul style="list-style-type: none"> <li>▪ Streamlined operations through a single CRM platform</li> <li>▪ Improved tracking and engagement from prospective students to alumni and donors</li> <li>▪ Enhanced data-driven decision-making and fundraising effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>▪ Operational Efficiency</li> <li>▪ Revenue Growth</li> <li>▪ Institutional Effectiveness</li> </ul>
2	Market Adjustment (Museum Director)	<ul style="list-style-type: none"> <li>▪ Retains experienced leadership critical to museum operations and programming</li> <li>▪ Ensures continuity of institutional knowledge and community engagement</li> </ul>	<ul style="list-style-type: none"> <li>▪ Current compensation is not competitive with market rates</li> <li>▪ Increased risk of turnover and loss of specialized expertise</li> </ul>	<ul style="list-style-type: none"> <li>▪ Improved staff retention and organizational stability</li> <li>▪ Increased competitiveness in recruiting and retaining leadership talent</li> <li>▪ Sustained quality and continuity of museum programming and partnerships</li> </ul>	<ul style="list-style-type: none"> <li>▪ Workforce Stability</li> <li>▪ Community Engagement</li> <li>▪ Institutional Reputation</li> </ul>
3	Director of Planned Giving	<ul style="list-style-type: none"> <li>▪ Establishes dedicated leadership for planned giving strategy</li> <li>▪ Expands identification and cultivation of legacy and major gift prospects</li> <li>▪ Strengthens long-term philanthropic pipeline</li> </ul>	<ul style="list-style-type: none"> <li>▪ Planned giving is currently a secondary responsibility, limiting effectiveness</li> <li>▪ Missed opportunities in long-term and legacy gift development</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increased planned and legacy gift commitments</li> <li>▪ Strengthened long-term financial sustainability</li> <li>▪ Allows Development Directors to focus on immediate fundraising priorities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Revenue Growth</li> <li>▪ Long-Term Financial Sustainability</li> <li>▪ Donor Development</li> </ul>

# **Part 3 – Institutional Listening** ***(FY27 Ideawake KSS*** ***Submissions)***

# Part 3. Institutional Listening

## University Advancement

### Advancement Strategy Summary

#### Student-Centered Innovation Through Scholarships

- Continuously refine scholarship strategies (freshman, middle-income, and graduate) to respond to changing enrollment trends and student needs.
- Use data, outcomes, and increase scholarships to impact recruitment, retention, and completion.
- Encourage philanthropic investment that supports new models of access and academic excellence.

#### Faculty Endowments

- Leverage faculty endowments to recruit, retain, and support outstanding academic talent.
- Provide stable, long-term resources that enable innovation in teaching, research, and curriculum development.
- Foster continuous improvement by allowing faculty to pilot new ideas, programs, and instructional approaches.
- Highlight the enduring impact of endowed faculty positions on student success and institutional excellence.

#### Facilities Fundraising as a Catalyst for Innovation

- Prioritize fundraising for facilities that advance innovative teaching, applied learning, research, and collaboration.
- Position facilities as philanthropic investments that enable continuous improvement through modernized, flexible, and adaptable spaces.
- Engage donors in a long-term vision for facilities that evolve with academic, technological, and workforce needs.
- Leverage naming opportunities and transformational gifts to support renewal, enhancement, and reinvention of campus infrastructure.
- Use outcomes, utilization data, and stakeholder feedback to demonstrate impact and guide future facility fundraising priorities.

# Part 3. Institutional Listening

## University Advancement

### Advancement Strategy Summary

#### Career Readiness as an Innovation Engine

- Invite donors to invest in innovative career readiness initiatives that align academic experiences with workforce expectations.
- Expand experiential learning, internships, and employer partnerships based on measurable outcomes.
- Continuously improve career readiness through technology, employer engagement, and alumni involvement.

#### Engaged Community and Alumni

- Strengthen lifelong connections, volunteerism, mentoring, and philanthropic engagement.
- Use engagement data and participation trends to refine outreach strategies and strengthen impact.
- Advance the museum as a center for education, storytelling, and community connection that reinforces institutional mission and identity.
- Engage alumni, donors, and the broader community through museum programming, exhibitions, and philanthropic support.
- Align alumni and museum engagement efforts to amplify institutional pride, visibility, and long-term support.



# Part 3. Institutional Listening

## University Advancement

### Advancement Key Themes

#### Continuous Improvement Through Philanthropy

- Strengthen fundraising effectiveness through data-driven decision-making, assessment, and adaptation.
- Expand and broaden the donor base by engaging new constituents and increasing access points to philanthropy.
- Build a sustainable donor pipeline that cultivates relationships from first-time giving through major and transformational gifts.
- Use donor feedback and outcomes to refine strategies and improve long-term philanthropic impact.

#### Innovation in Student Opportunity

- Advance scholarships and career readiness initiatives that evolve with student needs, enrollment trends, and workforce demands.

#### Sustainable Excellence

- Build long-term strength through faculty endowments and program support that enable academic innovation and adaptability.

#### Future-Ready Investment

- Position fundraising as an engine for innovation, supporting flexible, modern spaces that can be refined and reimaged over time.

#### Career Readiness and Workforce Alignment

- Strengthen readiness initiatives that integrate experiential learning, employer partnerships, and alumni engagement to improve outcomes.

# Part 3. Institutional Listening

## University Advancement

### Advancement Key Themes

#### Engagement as a Strategic Asset

- Leverage the Alumni Association and the Museum as platforms for connection, storytelling, and continuous engagement with alumni and the broader community.

#### Organizational Capacity and Structure

- Enhance staffing capacity to support expanded fundraising goals, donor engagement, and pipeline growth.
- Align organizational structure, roles, and resources to improve efficiency, collaboration, and accountability.
- Invest in professional development, tools, and systems that enable staff to innovate, adapt, and perform at a high level.
- Continuously assess organizational effectiveness to ensure alignment with evolving institutional and advancement priorities.

#### Enduring Impact and Legacy

- Emphasize named gifts, endowments, and transformational investments that create lasting value and reinforce institutional mission and identity.